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PACKAGING

THE CAHNERS MAGAZINE FOR DECISION-MAKERS/APRIL 1987

Non-Frozen Meals Try New Packages

- Packaging Line Pays-Off In Year
- How Campbell Tests CPET Trays
- Drug Packagers Face New Challenges
- Case-Packing Analysis Yields Savings
- Tough Label Liner Cuts Downtime to Zero
- Senior Citizens Want Improved Packages

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New challengers to frozen meals' supermarket reign are (far left) Culinova's dual-ovenable refrigerated meals and two shelf-stable microwavable entrees, Hormel's Top Shelf and General Foods' Impromptu.

ALTERNATIVES TO FROZEN MEALS

New packages hit the market for refrigerated meals and shelf-stable entrees. At stake is the huge—$4 billion and growing—market for frozen meals

By Ross Heuer Senior Editor

A line of dual-ovenable refrigerated meals with three to four weeks' shelf life and two lines of shelf-stable microwavable entrees are challenging frozen foods' long-established supermarket reign.

The three new challengers:

Culinova Group's controlled-atmosphere, refrigerated gourmet meals in dual-ovenable packaging that preserves freshness for three to four weeks. Culinova is a General Foods subsidiary.

George A. Hormel & Co.'s Top Shelf, billed as "the first shelf-stable entree designed especially for the microwave." Vacuum-packed in a multi-layered tray, entrees stay fresh without refrigeration for "18 months or longer."

General Foods' Impromptu shelf-stable, dual-ovenable entrees. Packed in crystallized PET trays and said to have 12-month shelf life.

"Refrigerated prepared gourmet meals" is not as yet an established supermarket product category but it may well achieve that status if the combination of upscale comestibles and unique dual-ovenable packaging developed by Culinova continues to win consumer acceptance.

The Hawthorne, N.Y. company's new line of refrigerated meals is clearly aimed at consumers whose tastes are at the upscale end of the ready-to-eat food spectrum and who perceive "refrigerated" foods as truly fresh, a status they would not confer on frozen or canned foods.

Currently in test market in selected supermarkets in Connecticut's Fairfield County, New Jersey's Bergen County and New York's Westchester County, the Culinova dinners retail in the $3.50 to $7 range. There are six dinners: Lasagne Florentine, Chicken Marinara, Chicken Dijon, Rock Cornish Hen Mourisca, Veal Vendee and Sole in Saffron Sauce.

The main components of Culinova's innovative package—a winner in recent packaging competitions conducted by DuPont and SPHE—are a transparent plastic dome, a plastic platter, a shrink bag and a wraparound paperboard sleeve. This combination affords the shopper an eye-catching view of the product

Hormel feels that Top Shelf represents the beginning of a new aisle in supermarkets across the U.S.

The innovative new products from General Foods and Hormel are aimed at a huge market that, mirroring the national appetite for convenience, is experiencing dramatic growth. Last year sales volume for entrees was up $718 million from 1983 and $52 million higher than 1985. Frozen dinners (entree plus vegetables, potatoes, dessert, etc.) were $262 million higher in 1986 than in 1983 and $11 million higher than 1985.

and incorporates unique techniques for consumer protection and for controlling the food's micro-environment.

According to Terry Taylor of the Culinova Development Team, the package maintains control of the micro-environment against the unstable elements encountered throughout the distribution process. It provides what Taylor terms "high quality freshness" for three to four weeks under normal refrigerated conditions.

Concerning the package's point-of-purchase impact, Taylor declared, "Inherent in the design is the tremendous visual appeal of this unique package—the customer can actually see the high-quality culinary configurations and beautiful colors through the clear see-through dome."

The oval-shaped plastic platter (10-5/8 inches × 6-5/8 inches × 1-inch deep) is microwavable, ovenable, reuseable and disposable. It can be used as serving platter or dinner plate.

The transparent dome, 10-9/16 inches × 6-9/16 inches × 1-3/4 inches high, fits the platter and provides the consumer with maximum visual product presentation and adequate top/bottom compression strength. It serves as a splatter shield during microwave cooking. The base of the dome is flanged for snug fit inside the platter bottom.

The 8 × 14-inch hermetically-sealed barrier shrink bag is the main barrier to hold in the modified atmosphere and inhibit microbial activity. It is opened via a pull tab at the top of the package.

Consumer protection is enhanced by a computer-aided laser beam-based polymeric strip safety bar code system that changes color when the product has been exposed to temperatures below refrigeration level. In addition, the consumer can easily see if the shrink wrap has been punctured or opened.

The wraparound SBS paperboard "hatband" sleeve (26-7/8 inches long × 2-3/8 inches high) is doubled over and glued to form a collar. The sleeve has die-cut slots that mesh with handles on both ends of the tray.

Graphics are designed so that pressure sensitive labels can be hand-appplied to the generic hatband. This allows maximum labeling flexibility which is needed for seasonal changes of food components accompanying the basic entree.

A black and gold label bears the entree name and identifies seasonal components. A burgundy and gold label conforms to FDA/USDA ingredient and nutritional labeling requirements.

Top shelf

Top Shelf's 10-entree line-up which represents Hormel's debut in the microwavable dinner field began testing in Indianapolis.

The multi-layered, plastic serving dish is sealed airtight with an easy-open lid. The trays are thermoformed by Continental Can which worked with Hormel in development of the Top Shelf package.

The tray sheet is an unbalanced four-ply polypropylene structure with Saran from Dow Chemical as its barrier layer.

The lid structure includes foil and the barrier material and several layers of other resins. The lid is semi-rigid to complement the tray structure in the retort and in distribution.

The 2-minute Top Shelf selections, ranging from Breast of Chicken Acapulco to Boneless Beef Ribs, are aimed at higher-income adults, ages 25 to 54, and Hormel recommends that they be positioned near dry pasta and spaghetti sauce products. Retail price range is $1.69 to $3.39.

According to Hormel, Top Shelf represents "the beginning of a new aisle in the supermarket—the "freezer free aisle of microwave entrees."

Impromptu

Impromptu's 10 entrees began their limited test in Evansville, Ind. and Portland, Maine. They retail in the $1.69-$2.79 range.

The products are packed in crystallized PET trays, sealed with foil-based lidding material and domed with opaque white plastic. Dome composition is at the moment a well-guarded secret as is the method for achieving 12-month shelf life.

Trays nestle into die-cut cartons. Entree variety is depicted by an outer paperboard sleeve. The whole assembly is shrink wrapped.

Package copy explains that the product's ingredients are "cooked to their steaming peak of perfection" and therefore stay fresh without refrigeration, freezing or preservatives.

However, the copy stresses that the entree must be refrigerated after opening. There are careful directions for both conventional and microwave ovens plus a line drawing depicting the plastic dome being used for microwave cooking only.

In addition, there is an 800-number for consumers to call with questions or comments. ■

ROSS HEUER
Senior Editor

America's growing appetite for convenience in all things is a continuing challenge to package designers. Nowhere is the effort to develop innovative packaging ideas more intense than in the prepared food market.

IMPORTS, EXPORTS RISE FOR MACHINERY IN '86

One potential untapped market is the USSR

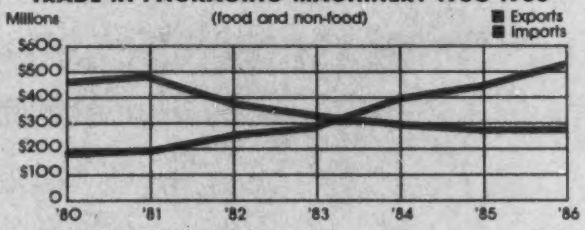
According to the U.S. Industrial Outlook 1987, imports of food and non-food packaging machinery registered their sharpest increase of the decade last year while exports also rose slightly, reversing a four-year decline. Food and non-food packaging machinery imports totaled an estimated $528.1 million last year.

Packaging machinery exports rose 2.4 per cent in 1986, reaching $278.3 million from $271.8 million in 1985, as exporters shipped products to 111 foreign markets. Leading customers by sales volume were Canada, the United Kingdom, Japan, Australia and Germany. One hot spot for exporters is the Pacific Basin. Exports to South Korea, for example, hit $16.3 million in 1986 after reaching only $4.7 million in 1985.

U.S. food products machinery companies exported a record $6.4 million to the Soviet Union last year compared to an average $4 million between 1980-1985. Under the auspices of the U.S. Dept. of Commerce, more than 60 companies from the industry participated in INPRODTORGMASH in Moscow last September, the first major international food equipment show staged in the USSR.

Shipments by the food products and packaging machinery industry are forecast to rise 2.5 per cent in 1987.

TRADE IN PACKAGING MACHINERY 1980-1986

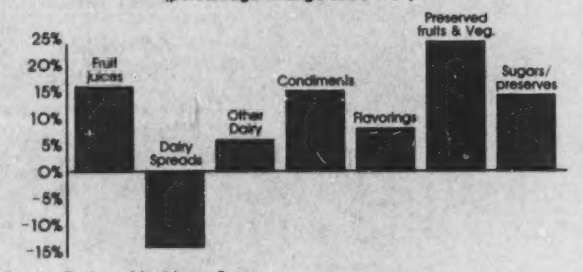


Source: Industrial Outlook 1987

Machinery imports continued rising in 1986, exports rose slightly, reversing a four-year decline.

FOOD ITEMS ADDING TAMPER-EVIDENT FEATURES

(percentage change since 1984)



Source: Rexham Machinery Group

PACKAGING LEADTIMES (in weeks)

	Feb. '87	Jan. '86	Feb. '86
Metal cans	3.5	3.7	3.4
Composite cans	4.4	3.3	3.5
Glass containers	4.0	4.7	4.9
Plastic bottles	3.8	3.2	3.8
Plastic film	4.0	3.5	3.6
Laminates	5.5	5.3	5.0
Corrugated containers	2.9	2.9	3.0
Multiwall bags	4.4	4.3	4.4
Kraft paper	3.0	3.2	2.7
Folding cartons	3.9	3.9	3.5
Fiber drums	3.0	2.9	2.6
Industrial crates	3.3	2.8	3.1
Strapping	2.6	2.7	2.5
Steel drums (shipping)	3.7	3.5	3.1
Pallets	2.8	2.5	2.9

Source: Purchasing, a Cahners Publication

TRANSACTION PRICES

	Feb. '87	Jan. '86	Feb. '86
Aluminum can stock ($/lb.)	1.08	1.07	.98
LDPE/liner($/lb.)	.29	.28	.33
LDPE/clarity($/lb.)	.33	.33	.37
LLDPE/butene($/lb.)	.28	.28	.32
LLDPE/octene($/lb.)	.35	.33	.37
HDPE/blow molding($/lb.)	.32	.34	.34
HDPE/film grade($/lb.)	.35	.35	.36
Polystyrene/general purpose($/lb.)	.37	.36	.34
Polystyrene/impact($/lb.)	.38	.37	.38
PVC/general purpose($/lb.)	.32	.31	.32
PP/homopolymer($/lb.)	.36	.36	.35
PP/copolymer($/lb.)	.46	.46	.47
ABS($/lb.)	1.01	.98	1.01
Unbleached kraft/shipping sack($/ton)	430	430	390
Unbleached kraft/grocery sack($/ton)	375	375	275
Linerboard, 42 lb. east($/ton)	350	350	260
Linerboard, 42 lb., west($/ton)	360	360	260
Corrugated med., semichemical($/ton)	320	320	235
Recycled folding boxboard, clay coated($/ton)	400	400	375
Recycled folding boxbd., chipbd.($/ton)	320	320	290
Bleached kraft, folding carton($/ton)	570	570	545

Source: Purchasing, a Cahners publication

MORE FOODS IN T-E CONTAINERS: STUDY

Use of T-E packaging up, but not for all foods

According to a 1984 study by two Cornell University professors, less than 1 per cent of all food products had tamper-evident packaging that would have met FDA regulations for over-the-counter drugs.

These results were recently upgraded in a 1986 study conducted by Rexham Machinery Group, Sarasota, Fla. The Cornell study itemized 29 groups of food products and their packages into four categories: (1) Likely to meet FDA regulations and also carries a label statement; (2) Likely to meet FDA regulations, no label statement; (3) Unlikely to meet FDA rules, though package has some degree of tamper evidence; and (4) Container has no tamper-evident feature.

Of the 29 categories examined, the seven which rated worst in terms of tamper-evident packaging were fruit juice and drinks, dairy spreads, other dairy products, condiments and dressings, flavorings, preserved fruits and vegetables and sugars and preserves.

Since 1984, according to the Rexham work, most of these categories have shown decreases in the number of products without tamper-evident packaging. Preserved fruits and vegetables dropped 24 per cent, fruit juices declined 16 per cent and condiments went down 15 per cent. However, the amount of dairy spreads without tamper-evident features rose 14 per cent.

MAJOR BOX MAKERS REPORT PRICE HIKE

Price rise to follow linerboard price increases

U.S. box producers are reportedly making an effort to raise corrugated box prices to keep pace with linerboard price increases from $320/ton in 1986 to $350/ton effective Jan. 1. Prices have been reported slightly higher, $360/ton, on the West Coast.

Box companies that have announced price increases of 10 per cent or more effective with January shipments include Stone Container Corp., Union Camp, International Paper, Jefferson Smurfit Corp. and Packaging Corp. of America.

MORE STATS . . .

1986 fiber box shipments totaled 283.6 billion square feet, 6 per cent higher than 1985 and the highest year in history, according to the **Fibre Box Association**. Containerboard consumption also set a new record at 20,967,607 tons, 5.4 per cent higher than 1985 . . . **PMMI** reports that packaging and packaging-related converting machinery orders for December were up 0.3 per cent from November and up 11.1 per cent from December 1985. Year-to-date orders are 2.1 per cent ahead of 1985 . . . The current market for flexible lidding materials could reach 150 billion square inches, according to the **Reynolds Metals Co.** . . . Metal cans account for 42 per cent of the $17.9 billion U.S. soft drink market, according to a new study by **Business Trend Analysts**. PET bottles weigh in at 27 per cent.

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SENIOR CITIZENS WANT IMPROVED PACKAGE GRAPHICS

Most discretionary dollars are in the hands of a fast-growing and largely neglected market—consumers over 55. To tap this market packaging graphics must accommodate impaired vision and other problems that go with advanced years

Who's invisible yet controls some 70 per cent of the worth of U.S. households?

"The mature market, the population over 55," says packaging consultant Herbert M. Meyers. "They're virtually unseen in advertising and marketing media."

And, contends Meyers, this neglect makes no sense: "People over 50 control about $7 trillion of wealth. The over-55 group, 22 per cent of our population, wields more discretionary dollars than any other age group—including the yuppies."

According to Meyers, managing partner of Gerstman+Meyers, Inc., a New York-based design and marketing communications firm, this neglect of an important market will soon end.

In a Pack Expo '86 presentation titled "Packaging For The Elderly—New Graphic Dimensions" Meyers asserted that marketers will soon be taking notice of this fast-growing segment and consumer product packaging will have to change to accommodate vast numbers of shoppers with impaired vision and other problems of advanced years.

His views supported by recent focus group findings, Meyers examined the ways that these problems relate to specific elements of packaging, the nature of changes needed and the scale of the market.

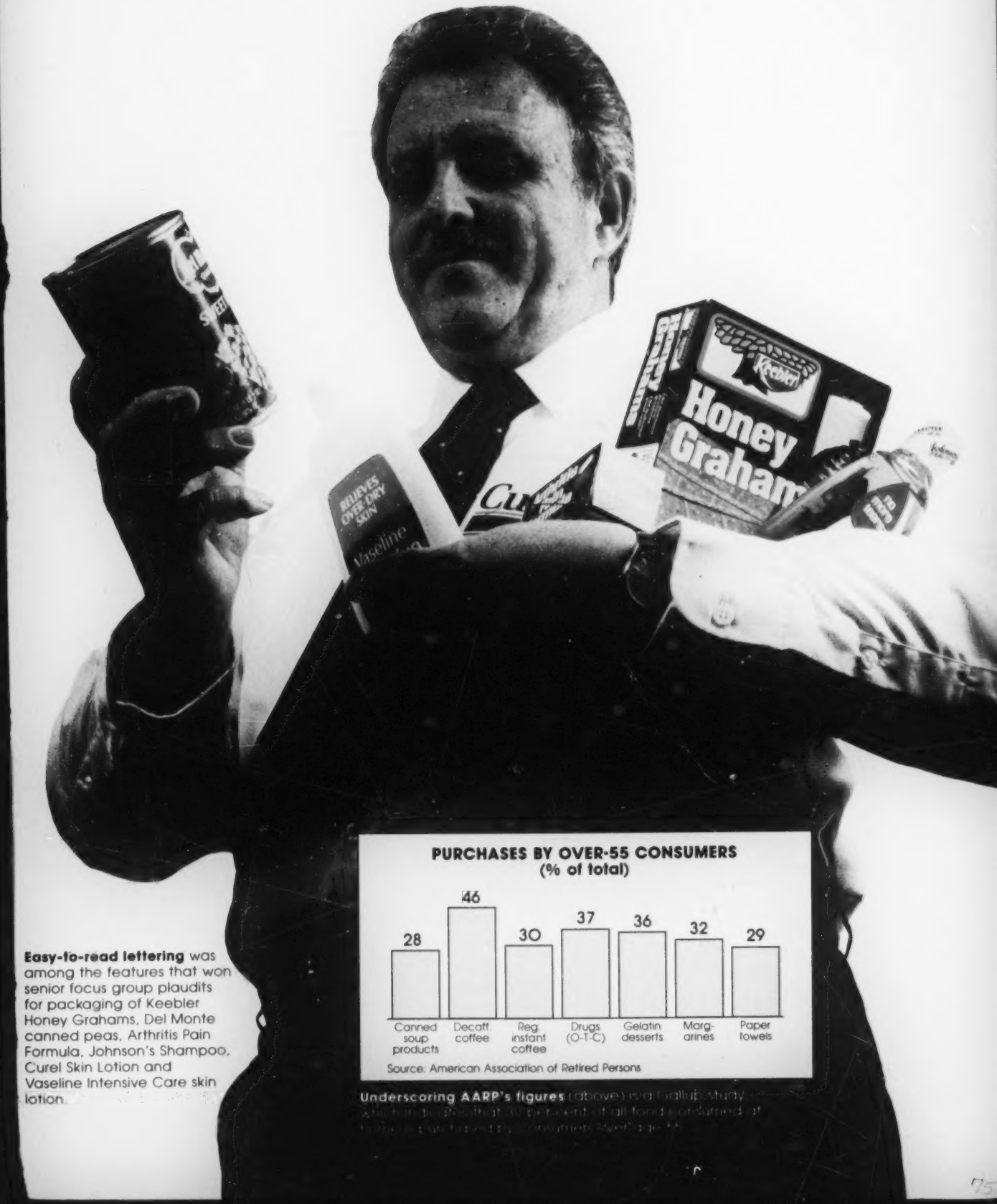
Noting that while yuppies are perceived by many marketers to have more spending power than older consumers, Meyers noted that the ever-growing senior segment controls 34 per cent of family purchasing decisions and buys, among other things, 30 per cent of all food consumed at home.

"Products and packaging for this growing market must consider the special needs and limitations of mature consumers, especially those with declining visual and motor capabilities," said Meyers. He identified problems that can make supermarket shopping difficult for older shoppers:

- By age 65, abilities to focus, resolve images, distinguish among colors and adapt to different lighting conditions diminish. Increased opacity of the eye, including cataracts and clouding of the lens of one eye, reduces the amount of light that enters. This makes the contrast level of any visual material a critical design element.
- The greater the contrast between two colors, or between an image and its background, the easier it is to see. The juxtaposition of black and white provides the greatest contrast but excellent contrasts can be obtained by many color combinations.
- Yellowing of the eye may reduce reception of violet light and result in difficulty discerning among blues, greens and violets. Red, oranges and yellows cause fewer color- perception problems. When colors are too close to background colors, legibility deteriorates for anyone, but especially for the elderly.
- Diminishing ability to focus impairs an elderly person's perception of small forms and letters. Small, crowded type on a label is hard to read as are very ornate typefaces. Use of simple letters, with adequate spacing between letters and lines of type, as well as good contrast, increases readability, even under adverse lighting conditions.
- Scripts and other ornate types may communicate quality, but obscure communications if not handled carefully to avoid visual clutter on the label.
- These impairments also mean that smaller blocks and short lines of copy are easier to read than copy arranged on long, extended lines. Additionally, readability is facilitated for the elderly by arrangements that give visual clues to the reader such as frequent indentation or standard capitalization.
- The visually impaired have more difficulty registering new images clearly because there is greater carryover from surrounding images, colors and shapes. The avalanche of images in supermarkets obscures the vision of the elderly by producing imagery overload.

Focus groups

Gerstman+Meyers recently conducted several focus groups with over-60 consumers. The groups concentrated on graphics for well-known brands in various categories



Easy-to-read lettering was among the features that won senior focus group plaudits for packaging of Keebler Honey Grahams, Del Monte canned peas, Arthritis Pain Formula, Johnson's Shampoo, Curel Skin Lotion and Vaseline Intensive Care skin lotion.

PURCHASES BY OVER-55 CONSUMERS
(% of total)

Source: American Association of Retired Persons

Underscoring AARP's figures (above) is a Gallup study [illegible]

Health benefits should be presented in impactful fashion

Among the problems noted by some of the panelists: Distinguishing the dark blue logo on the Cream of Wheat package's red background, difficulty reading Agree Shampoo's green label and—because of the small script— identifying Decaf on the Taster Choice jar.

and paid only minor attention to structural problems.

Categories included: canned coffee, instant coffee, canned soup, arthritis medication, sinus medication, antacid, skin lotion, shampoo, hair conditioner, household cleaner and paper towels.

Discussion and questions focused on readability, color, color-coding and product impression, ambience and imagery and overall impression. Questions unique to each set of products such as the value of specific illustrations were included.

The panelists' views

In the hot-cereal group, panelists viewed the Wheatena carton as an example of providing reassuring and important benefits to the elderly. Such benefits as no sugar and highest fiber are prominent in the front panel. The brand name is in easy-to-read white letters on a dark blue band. However, the panelists thought the package looked cluttered.

The Cream of Wheat package was criticized for the difficulty of distinguishing the dark blue logo on the red background.

Among the graham cracker packages Keebler Honey Graham was praised as appropriately old-fashioned. The panelists liked the product photography in close proximity to the logo, making the crackers more visible and appetizing.

The Honey Maid name confused some panelists. One asked, "What does Honey Maid mean?" But the Nabisco corporate endorsement was considered reassuring as to product quality.

The script typeface on the Stella D'Oro Breadstick packages was rated hard to read but panelists said that they recognized it in the stores.

There was no problem distinguishing between Sesame Breadsticks and Dietetic Breadsticks, but some panelists were confused regarding the meaning of the term "dietetic." Most panelists thought it meant low in sugar rather than low in salt. All agreed that this confusion would be eliminated if the small explanatory copy under "for sodium-restricted diets" were enlarged.

The red "No Salt Added" statement on a Del Monte canned pea label was judged extremely clear.

Instant coffee provided another situation in which product variety cues were confusing. The panelists considered Taster's Choice jars difficult to differentiate because of the small script lettering identifying the decaffeinated label. The males didn't see this as a problem since they knew that the color green indicates decaf but the female panelists want the designator to be clearer.

On the other hand, while the men felt that the word "instant" on the Maxwell House jar should be clearer, the women didn't—they know that coffee in a jar is instant.

In the personal-care categories readability was a major issue. Among shampoos, Flex was considered attractive despite the hard-to-read gold print but there was confusion as to whether it was a shampoo or conditioner. Johnson's was liked for the contrasting blue lettering. Agree's label was considered difficult to read and its green label inappropriate for shampoo.

In skin lotions, the Curel package was rated outstanding—crisp, clear, easy to read. Niven's white, highly stylized logo was found more difficult to read. Product information presentation was clearest on the Vaseline Intensive Care package, displayed at the top of the front label.

From the data collected Gerstman+Meyers drew the following general conclusions:

Elderly consumers are very "information sensitive" —they read labels very carefully, especially ingredient and nutritional information which pertain to dietary restrictions; preparation instructions; weight or serving size, which impacts on the price-value relationship; and expiration dates.

Because of elderly consumers' high degree of brand loyalty, equity of established brands is an important consideration in package redesign. Similarly, because these consumers tend to try new products based on exposure via advertising and coupons, the relationship between the package and these media becomes much more critical.

For the elderly, information must be conveyed clearly. Health benefits such as low-salt should be presented in uncluttered, impactful fashion—even at the expense of other elements of the package design.

Preparation directions and storage information must also be communicated clearly and legibly. In a category of seemingly equivalent products, one brand might carve a niche for itself with mature consumers vis-a-vis competitive brands by virtue of the superior communications ability of its packaging.

Finally, because these are price-conscious shoppers, the package must maximize the price/value relationship of the product.

Areas for improvement

Gerstman+Meyers concluded that in packaging, the areas with greatest potential of meaningful visual material for the older consumer include:

(1) Strong emphasis on brand identification, especially for well known brands.

(2) Clear, legible product designators.

(3) Bright, contrasting colors to enhance visibility.

(4) Simple, typographic styling of all copy.

(5) Large, open and carefully placed secondary copy relating to directions for use, nutritional and dietary information, cautionary statements, contents information, etc.

(6) Maximize emphasis on nutritional and dietary benefits.

(7) Less reliance on color-coding—more emphasis on clear verbal product differentiation.

(8) Good price/value communication. ■